



# SCHEDULE PICK SLIP REPORT

## QUICK REFERENCE GUIDE INV-35

INV

### Purpose

The purpose of this Quick Reference Guide (QRG) is to provide a step-by-step explanation on how to schedule a pick slip report in the North Carolina Financial System (NCFS).

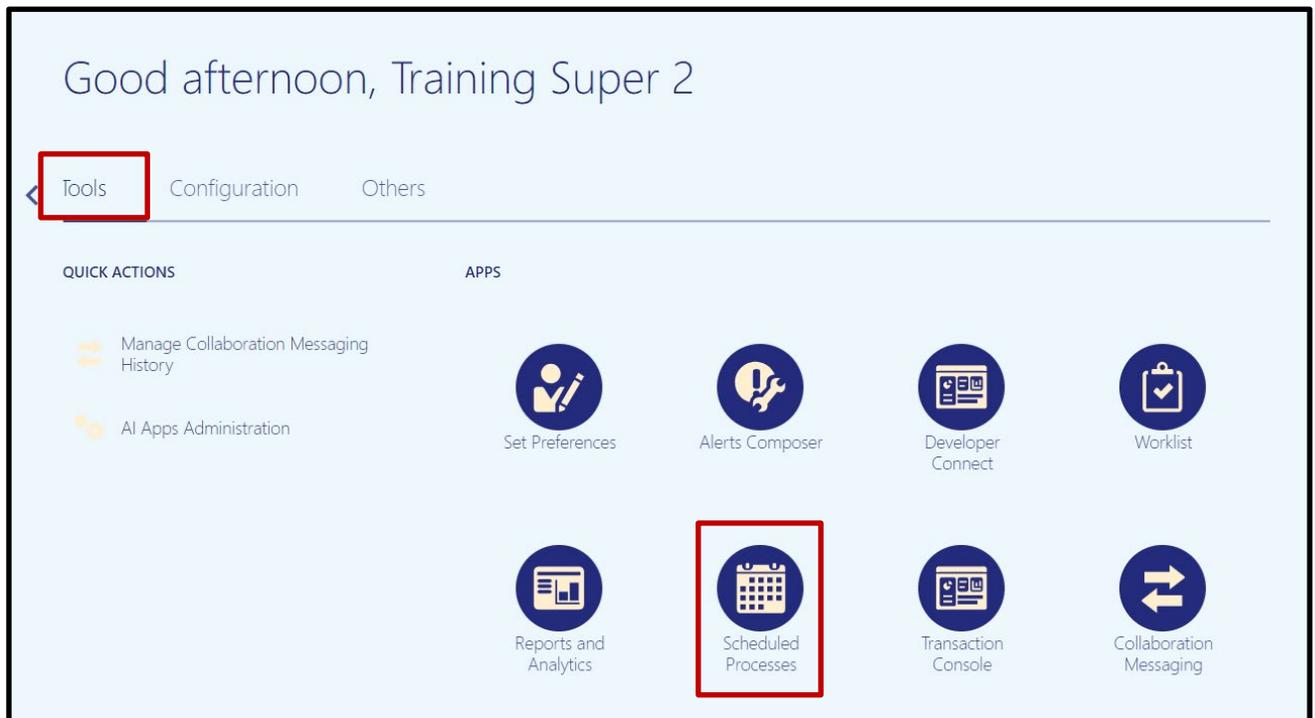
### Introduction and Overview

This QRG covers explanation on how to schedule a pick slip report in NCFS.

### Schedule Pick Slip Report

To schedule a pick slip report in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, under the **Tools** tab, click the **Scheduled Processes** app.



3. On the **Scheduled Processes** page, click **Schedule New Process**.

The screenshot shows the 'Scheduled Processes' page. At the top, there is an 'Overview' section with a search icon. Below that is a 'Search' section with a search icon and 'Search Results' text. There are radio buttons for 'View' set to 'Flat List' and 'Hierarchy'. A row of action buttons is displayed: 'Actions', 'View', 'Schedule New Process' (highlighted with a red box), 'Resubmit', 'Put On Hold', 'Cancel Process', 'Release Process', and 'View Log'. Below the buttons is a table with a 'Name' column containing four entries: 'Rebuild Learning Item Stop Word Index', 'Rebuild Learning Item Stop Word Index', 'Rebuild Learning Item Stop Word Index', and 'Provide Online Transaction Engine Functionality'.

4. Type *“Print Pick Slip Report”* in the **Name** field. Click **OK**.

The screenshot shows the 'Schedule New Process' dialog box. It has a 'Type' section with radio buttons for 'Job' (selected) and 'Job Set'. Below is a 'Name' text input field containing 'Print Pick Slip Report' (highlighted with a red box). A 'Description' field contains the text 'Provides information for picks and the corresponding details for pick slip.' At the bottom right, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red box.



- 5. Choose *All* from the **Line Status to Print** drop-down list. Choose *Both* from the **Item Display** drop-down list. Choose the Inventory Organization from the **Ship-from Organization** drop-down list.

**Process Details** ✕

ⓘ This process will be queued up for submission at position 1

**Name** Print Pick Slip Report  Print output ▼

**Description** Provides information for picks and the correspo...  Notify me when this process ends

**Schedule** As soon as possible **Submission Notes**

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**Basic Options**

Parameters

**Ship-from Organization**  ▼

**From Pick Slip**  ▼

**To Pick Slip**  ▼

**Shipping Method**  ▼

**From Order**  ▼

**To Order**  ▼

**From Movement Request**  ▼

**To Movement Request**  ▼

**Customer**  ▼

\* **Line Status to Print**  ▼

\* **Item Display**  ▼



6. Switch to the Advanced view by clicking **Advanced**.

The screenshot shows a window titled "Process Details" with a close button (X) in the top right corner. Below the title bar, there is an information icon (i) and a message: "This process will be queued up for submission at position 1". To the right of this message are four buttons: "Process Options", "Advanced" (highlighted with a red border), "Submit", and "Cancel". Below the buttons, the form contains the following fields:

- Name:** Print Pick Slip Report
- Description:** Provides information for picks and the correspo...
- Schedule:** As soon as possible
- Submission Notes:** An empty text input field.
- Print output:** A checkbox that is unchecked, followed by a dropdown menu.
- Notify me when this process ends:** A checkbox that is unchecked.

Below these fields is a section titled "Basic Options" with a sub-section "Parameters". At the bottom, there is a "Ship-from Organization" dropdown menu with the value "428330R" selected.

7. Click the **Schedule** tab.

The screenshot shows the same "Process Details" window, but now the "Basic" tab is selected instead of "Advanced". The "Advanced Options" section is visible, with sub-tabs for "Parameters", "Schedule" (highlighted with a red border), "Output", and "Notification". The "Ship-from Organization" dropdown menu at the bottom still shows "428330R".



- 8. Click the **Using a schedule** radio button. Choose the frequency from the **Frequency** drop-down list.

In this example, Daily was chosen.

The screenshot shows a web form titled "Advanced Options" with four tabs: "Parameters", "Schedule", "Output", and "Notification". The "Schedule" tab is active. Under the "Run" section, there are two radio buttons: "As soon as possible" (unselected) and "Using a schedule" (selected and highlighted with a red box). Below this is a "Frequency" dropdown menu, also highlighted with a red box, which is open and shows a list of options: "Once", "Hourly/Minute", "Daily" (highlighted in blue), "Weekly", "Monthly", "Yearly", "User-Defined", and "Use a Saved Schedule". To the right of the dropdown is a "Start Date" field with a calendar icon and the text "(UTC-05:00) New York - Eastern Time (ET)".



9. Enter your Start and End Dates.

In this example, an end date of 2099 was chosen.

### Advanced Options

Parameters **Schedule** Output Notification

Run  As soon as possible  
 Using a schedule

Frequency

Days Between Runs

\* Start Date  (UTC-05:00) New York - Eastern Time (ET)

\* End Date  (UTC-05:00) New York - Eastern Time (ET)



10. Click the **Output** tab to determine output location. Click **Add Output Document**.

### Process Details

i This process will be queued up for submission at position 1

Process Options | Basic | Submit | Cancel

**Name** Print Pick Slip Report  Print output Check P ▾

**Description** Provides information for picks and the correspo...  Notify me when this process ends

**Schedule** Using a schedule **Submission Notes**

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### Advanced Options

Parameters | Schedule | Output | Notification

View ▾ + × ?

Name	Layout	Format
Add Output Document		
No document defined		

11. Use **Name** field to name your output. Click **Add Destination** to choose a destination and complete relevant fields.

### Advanced Options

Parameters | Schedule | Output | Notification

View ▾ + × ?

Name	Layout	Format
Example Pick Slip	NC Pick List R ▾	PDF ▾

WshPickSlipBIPJob Document2: Destinations

+ Add Destination ▾

- Printer
- E-Mail
- Fax
- Content Server

12. Click **Submit** to schedule your pick slip report.

The screenshot shows a 'Process Details' window with the following elements:

- Process Details** (Title bar)
- Information icon: This process will be queued up for submission at position 1
- Buttons: **Process Options**, **Basic**, **Submit** (highlighted with a red box), **Cancel**
- Name**: Print Pick Slip Report
- Description**: Provides information for picks and the correspo...
- Schedule**: Using a schedule
- Submission Notes**: [Empty text box]
- Print output**:  Print output Check P v
- Notify me when this process ends**:  Notify me when this process ends
- Advanced Options** section with tabs: **Parameters**, **Schedule** (selected), **Output**, **Notification**
- Run** options:
  - As soon as possible
  - Using a schedule

## Wrap-Up

Schedule pick slip report using the steps above in NCFS.

## Additional Resources

### Virtual Instructor-Led Training (vILT)

- INV 105: Warehouse Management (ILT)
- INV 106: Warehouse Transaction Support (ILT)

